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# **Sun City Summerlin Computer Club Seminar**

## **Introduction to Microsoft Excel**

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# Where to Find the Materials

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- **Sun City Summerlin Computer Club Website:**
- <https://www.scscclub.com/smnr>
  - *Acrobat .PDF file of these slides*
  - *.ZIP file of the example spreadsheets*

# Seminar Agenda

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- **Introduction**
- **Excel Spreadsheet Basics**
- **Example 1 – Home Financial Analysis**
- **Example 2 – Contact List / Roster**
- **Example 3 – Outliving Your Money?**
- **Open Workshop / Q and A**

# Introduction

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- **Benefits of Excel:**
  - *Easy to use for “modeling” a computational problem.*
  - *Construct simple worksheets quickly.*
  - *Excel is very “smart” in helping layout.*
  - *Good way for non-programmers to get their PC to do “custom” things.*
  - *Worksheets hold both data and formulas.*
  - *Rich graphics for data visualization.*

# Excel Spreadsheet Basics -1

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- **Demo File: Introduction.xlsx**
- **Worksheet:**
  - *Rectangular array of Rows and Columns*
  - *Columns identified by letters (A, B, C, ...)*
  - *Rows identified by numbers (1, 2, 3, ...)*
  - *Intersection of a Row and Column is a Cell*
  - *Each Cell has an “address” (column, row)  
e.g. A5, C31, Q199*
- **Workbook:**
  - *Collection of one or more Worksheets*
  - *A worksheet can refer to cells in another sheet.*

# Excel Spreadsheet Basics -2

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- **Cells can contain:**
  - *Numbers: 50, 75.375, 20%, \$3,595.95, ...*
  - *Text: "Tom", "Mary", "Gasoline", "Total" ...*
  - *Dates: May 3, 2002 , 05/03/02*
  - *Times: 01:45:00 PM , 13:45:00*
  - *Formulas: =B3+B5, =C25 / 15, =Sum(D8:G8)*

# Moving Around in Excel

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- **Using the Mouse**
  - *Click on a cell to select it*
  - *Drag to select a range of cells*
  - *Right-click to open a context menu of actions*
- **Using the keyboard**
  - *(left, right, up, down arrows)*
  - *PageUp, PageDown, Home*
  - *Ctrl+Home, Ctrl+End*
  - *Ctrl+(left, right, up, down arrows)*
  - *Tab key, Shift+tab key*

# The Excel Ribbon

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- **The “ribbon” (tabbed interface) was introduced in Office 2007**
  - *User interactions organized in a panel of tabs*
  - *Each tab holds interactions for “related” functions*
  - *Not too difficult to use once you learn where things are*
  - *Placement of things by MS isn’t always logical*
  - *The ribbon can be hidden to make more room on the screen*

# Editing in Excel

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- **From the Cells Panel of the Home Tab**
  - *Delete cell range contents (Del key)*
  - *Delete entire row (right click > Delete)*
  - *Delete entire column (right click > Delete)*
  - *Copy (Ctrl+C) / Cut (Ctrl+X) / Paste (Ctrl+V) a range of cells*
  - *Insert rows, columns (Insert dropdown)*
  - *Change column width, row height*
- **Editing a single cell**
  - *Click in the cell*
  - *Then begin typing in the cell or in the text box at the top*
  - *Or you can paste a value from the clipboard*

# Formatting Cell Contents

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- Use Home > Cells > Format
- or Right click and choose Format Cells
- or Use the Formatting toolbar buttons
  - *Bold, Italics, Underline*
  - *Gridlines around cells*
  - *Fonts (Face, size) e.g. Arial 12*
  - *Colors and patterns*
  - *Text alignment, indenting*
  - *Number formats*
  - *Merging Cells – usually for titles*

# Common Operations in Formulas

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- **Add (+)**                      **=C5 + 2 , =F20 + F21**
- **Subtract (-)**                      **=C7 - 1, =E15 - E14 - E13**
- **Multiply (\*)**                      **=A12 \* 4, =D13 \* G21**
- **Divide (/)**                      **=Q17 / 12, =C4 / D4**
- **Exponentiate (^)**                      **=T5 ^ 3 (same as T5 \* T5 \* T5)**
- **Concatenate (&)**                      **=A3 & " years"**

# Commonly Used Functions

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- **=Sum(<range>)**
- **=Round(<cell>, digits)**
- **=Average(<range> or list of cells)**
- **=Min (<range> or list of cells)**
- **=Max(<range> or list of cells)**
- **=Count(<range>)**
- **=Text(<cell>,"<format expression>")**
- **=Today()**
- **=Now()**

# Excel Help

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- **Help Tab / Help?**
  - *Extensive information*
  - *See Creating Formulas ...*
  - *See Entering Formulas*
- **See Formulas tab**
  - *Click category dropdowns to get list of functions*
  - *Hover over a function name to get a description*
  - *Double click to insert a function into a cell and open a dialog with parameters for that function*

# Example 1 – Home Financial Analysis

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- **Demo file: Budget.xlsx**
- **Organized Description of Items, Costs**
- **Subtotals for each major category**
- **Illustrates various formatting options**
- **Useful for forecasting and planning**
- **Useful for comparing plan to actual expenses**

# Example 2 – Contact List

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- **Demo file: Contacts.xlsx**
- **Uses Excel as a simple database**
- **“Name” column is a formula**
- **Last Name and First Name columns normally hidden**
- **Demonstration of Search**
- **Demonstration of Sorting**
- **Demonstration of Auto-Filtering**

# Example 3 – Outliving Your Money?

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- **Demo file: Retirement.xlsx**
- **Analysis of How Long Current Assets Will Last**
- **Includes some actuarial calculations**
- **Looks at feasibility of moving to an apartment at an independent living facility**
- **Let's take a look ...**

# Example 4 – Landscape Plan

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- **Demo file: LandscapePlan.xlsx**
- **Diagram of placement of new trees and shrubs**
- **Uses Excel's drawing tools:**
  - *Shapes*
  - *Lines*
- **Uses text in cells as descriptions of new plants**

# Open Workshop / Q and A

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- **Your Excel**
- **Problems and Questions**